DOCUMENT RESUME

ED 391 328 EC 304 577

AUTHOR	Hadden, Sarah; And Others
TITLE	Writing an Interagency Agreement on Transition: A Practical Guide. FACTS/LRE Information Series #5.
INSTITUTION	Illinois Univ., Urbana.
SPONS AGENCY	Special Education Programs (ED/OSERS), Washington, DC.
PUB DATE	95
CONTRACT	HD02420001
NOTE	56p.; A publication of Family and Child Transitions into Least Restrictive Environments.
AVAILABLE FROM	FACTS/LRE, University of Illinois at Urbana-Champaign, 61 Children's Research Center, 51 Gerty Dr., Champaign, IL 61820.
PUB TYPE	Guides - Non-Classroom Use (055)
EDRS PRICE	MF01/PC03 Plus Postage.
DESCRIPTORS	*Agency Cooperation; *Cooperative Planning; Cooperative Programs; Disabilities; *Early Intervention; *Educational Planning; Interdisciplinary Approach; Preschool Children; *Preschool Education; School Community Relationship; Teamwork; *Transitional Programs; Young Children

ABSTRACT

This manual provides detailed, step-by-step information on developing and writing an interagency agreement to facilitate the transition of young (age 3) children with disabilities from early intervention programs into preschool educational services under Part B of the Individuals with Disabilities Education Act. Worksheets are provided throughout the manual to assist in the process of writing the agreement. An introductory section considers preliminary aspects such as forming a team to write the agreement and the overall process of writing an agreement. The next section considers seven aspects of the agreement: (1) the purpose statement; (2) transmitting information; (3) discussing transition issues with families; (4) determining eligibilty; (5) and (7) monitoring the agreement. The two remaining sections offer guidelines for developing a collection of best practices and getting the interagency agreement signed. Appendices include a glossary of terms and the worksheets used in writing the agreement as well as a sample transition timeline and sample interagency agreements. (DB)

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WRITING AN INTERAGENCY AGREEMENT ON TRANSITION

A Practical Guide

Family And Child Transitions into Least Restrictive Environments
University of Illinois at Urbana-Champaign

EC304577

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About the FACTS/LRE Information Series: This booklet is one in a series designed to provide practical information to the various audiences concerned about transitions: families, educators, service providers, and members of state and local interagency councils. For more information about FACTS/LRE, please turn to the back of this publication.

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THE IMPORTANCE OF TRANSITIONS— AND THE AIMS OF FACTS/LRE

Transition—a process in time that occurs between events—takes place throughout our lives. There are the transitions we make quite frequently—traveling between home and work, picking up children after school, cleaning the house or apartment before receiving guests. And then there are transitions that signal the start of a whole new set of activities and routines.

Remember your first day of school? Your child's first day of school or day care? The first day on a new job?

How did you plan for these important transitions? Did you visit in advance? Purchase new clothes? Get a haircut? Double check the bus route?

Transitions often work best if they are planned. Presidents and governors have "transition teams" to assist with these milestones in their lives. The rest of us generally get by without dozens of paid helpers. Still, the decisions that are made, the events that take place and the feelings that arise during transitions have profound consequences in all of our lives.

Young children with special needs and their families experience several transitions. The first transition occurs when the child is born and becomes a member of the family. Other transitions take place as a child's disability or special need is identified and relationships with service providers are established. Later transitions take place as changes are made from one service provider or educational setting to another.

FACTS/LRE means Family And Child Transitions into Least Restrictive Environments. Our project produces publications and offers direct technical assistance to see that the transitions experienced by young children with special needs and their families are not treated as an afterthought but are given the serious attention they deserve. We focus especially on the transition that occurs as a child approaching age three prepares to exit from early intervention services. However, most of our materials are also relevant to transitions that occur at other ages.

WRITING AN INTERAGENCY AGREEMENT ON TRANSITION

A Practical Guide

Sarah Hadden
Susan A. Fowler
Dale B. Fink
Michael W. Wischnowski

A publication of FACTS/LRE
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FACTS/LRE has worked with 37 Local Interagency Councils representing over 80 counties in the State of Illinois to assist them in writing their own interagency agreement on the age three transition. Our project has also worked with 5 First Steps Councils representing 10 counties in Indiana.

Each year, hundreds of thousands of young children exit early intervention programs. Many of these children are eligible to receive continued special education services under Part B of the Individuals with Disabilities Education Act (IDEA). At one time, the service options for these children were fairly limited, with the overwhelming majority of children receiving services through a special education preschool program run by the local school district. However, there is a growing recognition that the individual needs of children and families may be met in a variety of settings. The movement towards inclusion, bolstered by the current interpretation of the least restrictive environment (LRE) clause in IDEA, has led to increased placement options for preschool children with special needs. While some children may receive special education services in a special education preschool program, other children will receive services in their home, child care, or community preschool. The wide range of service options can complicate the transition from early intervention, as policies may differ from one service provider to another. Variations in how eligibility is determined, how information is transferred, and the type of service plan used are examples of the many differences that families may encounter as they prepare their child to make the age three transition. It is not unusual for parents to report that their child's transition from early intervention was hectic or chaotic. However, this transition does not have to be disruptive: with careful planning, the transition from early intervention to preschool services can be smooth.

An interagency agreement that focuses on the age three transition can guide service providers in planning transitions. A good interagency agreement will establish predictable guidelines, spell out procedures to be followed, and clarify the roles and responsibilities for individuals and agencies participating in the transition. For example, an interagency agreement should specify how information is transmitted from one agency to another, how assessments are conducted, and how eligibility for continued services is determined. In sum, an interagency agreement provides communities with a clear plan that can help to facilitate a family and child's transition from early intervention to preschool or other service options.

An interagency agreement provides communities with a clear plan that can help to facilitate a family and child's transition from early intervention to preschool or other service options.

Writing an interagency agreement is not always easy. It takes time, commitment, and hard work. However, the benefits make the effort worthwhile. The purpose of this manual is to provide you with detailed, step-by-step information about how to write an interagency agreement on the age three transition in your own community. Worksheets that help you move through the process of writing an agreement are provided. After completing these worksheets, you will have the outline of an agreement. The information presented in this manual is based on our own experiences in assisting many communities to write their own interagency agreements.

What benefits do you see coming out of the agreement?

I just think it's a great deal less frightening for everybody. The early childhood personnel would know and be able to communicate with EI people and EI people would be able to communicate with the families. And the families are going to be able to communicate with early childhood people.

. . . I wish we could do this with just about everything we have. And I wish it would be as easy.

— Anonymous

Actually the families are the ones benefitting the most. Because the transition from early intervention is just a lot smoother. We know who to connect them to.

— Anonymous

What do you think will happen as a result of having this agreement?

Well, I think that there will be greater communication between school representatives and school districts and early intervention providers. And I think that can only lead to better services for the child. I think it will enhance the networking among local service areas providers. Any time that we communicate with each other, share information, share ideas, share resources, then the families are ultimately served. So I think it will provide a more seamless transition between early intervention services and school services.

— Anonymous

SETTING THE STAGE

FORMING A TEAM TO WRITE THE AGREEMENT

Before you sit down to draft an agreement, you will want to pull together a "transition team" to work on the agreement. Who should be on that team? Clearly, it will vary from community to community. However, we suggest that the following individuals be invited to participate:

- representative(s) from early intervention agencies that serve children in your community
- representatives from school districts that serve children in your community
- parents of young children who have special needs
- the coordinator of your Local Interagency Coordinating Council
- representatives from other community agencies who serve children with and without special needs (e.g., Head Start, community child care facilities, and community preschools)

In those communities that have a Local Interagency Coordinating Council, it has been helpful to have the coordinator of the council pull the team together. Try to ensure that all individuals on the team have the time to commit to the process. Chances are, you will not write your agreement in one day!

What should you do if you have six school districts in your community and only three agree to participate in writing the agreement? Don't worry about it. Work with the people you have. In our experience, individuals whose agencies did not participate in writing the agreement often have decided to sign it after it was completed.

THE PROCESS OF WRITING AN AGREEMENT

Your team will get together as a group on several occasions to draft the agreement. Some teams will meet six or seven times over the course of several months before the agreement is finalized. Typically teams whose members have not worked together in the past on a common issue require more time to become acquainted with each other, to share information, to build trust, and to reach consensus on issues addressed in the agreement. During these meetings, you will work through the worksheets provided in this manual. Each worksheet addresses a specific component of the agreement. As a team, you will need to reach consensus on how you want to address that component in your own agreement. You will answer several "wh" questions: ***what*** transition related activities you want to take place, ***when*** you want them to take place, and ***who*** will be responsible for making sure that they take place. In addition, you will also determine ***how*** they will take place.

Team members will discuss their views on the different topics until agreement is reached, although it may take some time for this to happen. Sometimes, you will find that the group is having difficulty reaching accord on a specific topic. You may find it helpful to put that topic aside and move on to another one. You can always revisit the first topic at a later date. In some instances, it may be useful to invite an objective outsider to facilitate group discussion around a sticky issue.

To ensure consistency from meeting to meeting, we recommend that you designate one individual as the official note taker. That person can take the draft from each meeting, type it, and circulate it prior to the next meeting. If you have access to a lap top computer, bring it along. Typing as you go can speed up the process considerably. We suggest that you start each meeting by reading the draft agreement out loud to make sure that all members agree with the language it contains. It may be slow going at first, but this investment of time has led many teams to achieve consensus and to take ownership in their finished work.

WRITING YOUR AGREEMENT

The worksheets provided in this manual address seven components that should be included in your community's interagency agreement:

- Purpose statement
- Transmitting information from sending to receiving agencies
- Discussing transition issues with families and identifying support for families in the transition process
- Determining eligibility for continued services
- Selecting appropriate services for eligible children
- Preparing children for transitions
- Monitoring the agreement

The worksheets that follow provide guiding questions to assist you in thinking through how you would like to do things in your own community. For each component we will ask you to address four questions:

(1) ***What*** transition related activity needs to take place?
(2) ***When*** will that transition related activity take place?
(3) ***Who*** is responsible for making sure that the activity takes place?
(4) ***How*** will that transition related activity take place?

We hope that this format will assist you in developing a clear, concise plan that will assure continuous, well coordinated services for young children and their families.

1. PURPOSE STATEMENT

The purpose statement provides a framework for the interagency agreement and sets forth a vision for what you hope to accomplish with the agreement. The purpose statement should address these questions:

(a) Whom will the interagency agreement serve?

(b) What will the interagency agreement do for these people?

(c) What values guide or underlie our activities?

We recognize that a transition from early intervention to an early childhood program is a major event in a child's life. The intent of this agreement is to promote a seamless service delivery system at this transition stage for young children with special needs and their families living in Sangamon, Logan, Mason and Menard counties. It is our intent that this agreement will be family-focused, will reduce any anxiety of children and families facing this transition, and increase collaboration among those providing services. This agreement will establish predictable guidelines to follow. Our commitment is to keep each other well-informed, to avoid duplication of effort, to close gaps in service delivery, and to ensure that needs and aspirations of families and children are at the center of each child's transition.

— FACES-Local Interagency Council, Springfield, Illinois

INTERAGENCY AGREEMENT ON TRANSITION

Purpose Statement

This interagency agreement is designed to:

***T** ransition children from early intervention to early childhood services in a timely manner;*
***R** espect the rights, opinions, and concerns of the diverse tri-county population;*
***A** llow for flexibility in options for service delivery and settings;*
***N** urture a parents-as-partners philosophy through parental training and support;*
***S** treamline the transition process through a collaborative team effort;*
***I** nclude follow-up and safeguards throughout the transition process;*
***T** rack information flow to eliminate gaps and duplication of services and assessments;*
***I** mplement a mutually beneficial, family-friendly system of transition;*
***O** utline specific procedures and timelines for transition planning and implementation;*
***N** etwork parents and interagency staff into teams focusing on the best interest of each child.*

— Cass-Morgan-Scott Local Intervention Council, Jacksonville, Illinois

2. TRANSMITTING INFORMATION

A clear plan for sending and sharing information between sending and receiving agencies will improve accessibility of services—and promote an efficient use of resources. The intent of this section of the agreement is to identify information that must be shared between the sending and receiving agencies. Agency personnel can gather pertinent information by asking themselves the following questions:

- ***What*** information must be shared?
- ***When*** is information to be shared?
- ***Who*** shares information?
- ***How*** is information shared?

In addition to gathering information around key questions, the following issues should be considered when writing this section.

A clear plan for sending and sharing information between sending and receiving agencies will improve accessibility of services—and promote an efficient use of resources.

A. OBTAINING INFORMED CONSENT

What: To protect the confidentiality of children and their families, it is essential to define or clarify the concept of informed consent within the agreement. Informed consent means that parents and guardians have the opportunity to review the information that will be provided to the receiving agency and consent to its release. Parents must sign an informed consent form before any information is released.

To protect the confidentiality of children and their families, it is essential to define or clarify the concept of informed consent within the agreement.

How: The informed consent form should be in the parents' first language and should specify that they have the right to either add or rescind information that is sent to the receiving agency.

When: Informed consent to release information may be obtained at any time. Many programs ask families to sign a release of identifying information at enrollment. They may wait until they begin planning for the child's transition (e.g., 90-180 days before the child's third birthday) to request consent to release more detailed information. Some agencies request that families sign a "blanket" release at their child's entrance to a program. Blanket release forms which give the early intervention agency the ability to send anything they want should be avoided as they take away the parents' rights to review information forwarded to the receiving agency.

Who: Early intervention programs typically request the informed consent from the child's parents or guardians.

How: Informed consent should be fully explained to the parents. Parents have the option of waiting to sign the consent.

To insure informed consent, parents and guardians will have the opportunity to review exactly what will be shared with the receiving agency...Parents and guardians will be invited to add or rescind information that they would like to send to the receiving agency.

— Local Interagency Council of Rock Island & Mercer Counties, Rock Island, Illinois

B. RELEASING IDENTIFYING INFORMATION

What: Identifying information consists of the name, birthdate, parents or guardian's name, address, phone number, and the suspected disability of all potentially eligible children. Some families may not be comfortable having their child's suspected disability forwarded to the LEA. Your team will need to discuss whether information related to suspected disability is routinely forwarded.

When: This information is sent by the early intervention agency only after informed consent is obtained. Sending and receiving agencies must agree on a schedule for sending information regarding potentially eligible children. Options may include: (a) sending information as soon as a child enters the early intervention system, (b) sending information when a child reaches a specific age (e.g., 30 or 33 months), or (c) identifying standard calendar dates when information will be sent (e.g., October 15, April 15) on all children enrolled in the early intervention program.

Who: This information is released to the local education agency by the early intervention agency to assist with Child Find activities. To expedite planning for future enrollments or service needs, sending and receiving agencies may wish to establish dates for releasing identifying child and family information. This assists school districts in determining who (or how many children) in their service area potentially may require services at age 3. Because families may move or children may graduate from services, it may be helpful to periodically update the service list.

Annually by December 31, referring agencies will forward to the LEA designee a count of all children who live in that district and are receiving EI services on December 1.

— Mid-Illinois Local Interagency Council, Vandalia, Illinois

C. FORWARDING MORE DETAILED INFORMATION (IFSPs, EVALUATIONS)

What: Detailed information includes the child's name, demographic information, current IFSP, the most recent assessment and related service evaluations, and

any other information generated by the sending agency that parents wish to include. Some early intervention agencies may not be able to release information that was not generated by their agency. In this instance, parents may need to sign an additional release form to allow the receiving program to request records from related service providers that are not a part of the early intervention program.

When: The formal onset of transition planning (90 or 180 days before the child's third birthday) typically provides the time frame for releasing more extensive information regarding the child (e.g., IFSPs, evaluations, etc.). Information is forwarded prior to the child turning three and with sufficient lead time to allow the receiving agency to use information in planning for the child's service needs.

Who: The early intervention agency sends all information to the receiving agency.

D. SENDING DISCHARGE REPORTS

What: A discharge report summarizes the progress that a child has made since entry into the early intervention program. This report may include other documents or notes from the program.

When: The discharge report may be sent after the child is formally discharged from the program. However, you may wish to consider summarizing the child's progress one to two months prior to discharge to allow this information to be used in determining appropriate goals and objectives for children who are eligible for special education services.

Who: The sending agency is responsible for sending the discharge summary to the receiving agency.

Federal regulations (34 CFR 303. 344) require that families be provided with information regarding the transition process as well as training regarding their legal rights.

3. DISCUSSING TRANSITION ISSUES WITH FAMILIES AND IDENTIFYING SUPPORT FOR FAMILIES IN THE TRANSITION PROCESS

To be active participants in the planning process, families must have information. Federal regulations (34 CFR 303. 344) require that families be provided with information regarding the transition process as well as training regarding their legal rights. The intent of this section of the interagency agreement is to identify the information that families should receive and the roles that families may wish to assume in planning for the change in services. The agreement should focus on what information must be shared, when it is shared, and by whom.

The following issues should be considered in writing this section. Items A and B must be addressed to ensure that legal requirements are met.

The referring agency and the receiving agency each shall designate a contact person(s) responsible for coordinating transition activities for children under the age of kindergarten.

— Birth-Through-Five Interagency Coordinating Council of Coles, Cumberland, Douglas and Shelby Counties, Charleston, Illinois

Parents, sending agencies, and receiving agencies will collaborate to provide a workshop for families to acquaint them with transition issues, procedures, and parents' legal rights.

— Greater Interagency Council, Flossmoor, Illinois

(1) The IFSP must include steps to be taken to support the transition of the child, upon reaching age three, to-

(i) Preschool services under Part B to the extent that those services are considered appropriate; or

(ii) Other services that may be available, if appropriate.

(2) The steps required in paragraph (h) (1) of this section include-

(i) Discussions with, and training of, parents regarding future placement and other matters related to the child's transition;

(ii) Procedures to prepare the child for changes in service delivery, including steps to help the child adjust to, and function in, a new setting; and

(iii) With parental consent, the transmission of information about the child to the local educational agency to ensure continuity of services including evaluation and assessment information required in 303.322, and copies of IFSPs that have been developed and implemented in accordance with 303.340 and 303.346.

— Federal regulation 303.344 from PL 99-457, Part H

A. ACQUAINTING FAMILIES WITH PROCEDURES, TRANSITION ISSUES, LEGAL RIGHTS UNDER PART B (SPECIAL EDUCATION AND RELATED SERVICES)

What: There are a number of issues with which families need to be acquainted prior to the transition. These issues include:

- a timeline for transition related activities
- family rights and responsibilities
- eligibility criteria.

When: Federal guidelines require that transition planning begin at least 90 days before the child turns three; some states (e.g., Illinois) require notification and planning 180 days before the third birthday. The intent of planning is to provide families with information about the process as well as information about their legal rights. Such planning may begin as soon as families enter early intervention services or as late as 90 or 180 days before the child reaches three years of age.

Who: The team should designate which agency will provide the information or if it will be provided in concert by referring and receiving agencies.

How: Information should be written and whenever possible provided in the family's first language. Some agencies provide annual or semiannual workshops and open houses to share this information with families.

B. AMENDING IFSPs TO INCLUDE TRANSITION PLANS

What: At a minimum, the transition plan should address:

- ways to prepare the child and family for transition
- when, how, and to whom records will be transmitted
- provision of information to parents regarding the transition process
- provision of information to parents regarding their rights
- a plan to assist families whose child may no longer be eligible for special education and related services to identify other service options in their community (e.g., Head Start, child care).

When: The IFSP should be amended at least 90 days before the child turns 3 years and in some states 180 days before the third birthday.

Who: The referring agency or service coordinator is responsible for convening a team meeting with the family to develop the transition plan. In some communities, the receiving agency (LEA) sends a representative to this meeting to begin sharing information regarding the continuum of services and to ensure collaborative planning with the family for the transition.

How: A written plan is required.

The plan should include information such as the identification of the child's skills, experiences which would assist the child, techniques which work well with the child, and other service needs expressed by the parent/legal guardian.

— Local Interagency Council of Macon, Piatt, DeWitt, and Moultrie Counties, Decatur, Illinois

C. HELPING FAMILIES BECOME FAMILIAR WITH THE ARRAY OF SERVICES FOR WHICH A CHILD MAY BE ELIGIBLE

What: Families should receive information about services currently offered by the local school district as well as community based preschool programs, park and recreation services, etc.

When: At a minimum, this information should be provided within the 90 to 180 day planning time.

Who: The referring and/or receiving agency should provide this information.

How: Options may include: written information (such as resource directories); workshops with representatives from a range of services and programs; and visits by family members to services and programs which are of interest to them (e.g., community preschools, Head Start, private services).

The sending agencies will provide families the opportunity to view available videotapes of various public school early childhood classrooms, private preschools, Head Start, day cares, and public programs.

— McLean County Local Interagency Council, Bloomington, Illinois

D. PROVIDING SUPPORT FOR FAMILIES IN PREPARING THEIR CHILD FOR THE TRANSITION

What: Specific supports should be family driven and need not be specified in the agreement unless financial arrangements are involved. In such cases, the agency assuming fiscal responsibility for certain supports (e.g., transportation for program visits) may be specified along with the support. Examples of support may include: assisting families in visiting potential programs, arranging transportation to attend meetings, home visits to provide information, and if needed, support and training on "readiness" skills to assist the child's adjustment to new services.

When: Support should be available throughout the 90-180 day planning period.

Who: By the referring and/or receiving agency.

How: Support can be determined in the IFSP transition plan.

Support activities should be written into the transition plan. Support activities may include parent to parent linkages, visits to potential programs, advocacy training, play groups, and consultation with EI family support specialists.

— Mid-Illinois Local Interagency Council, Vandalia, Illinois

4. DETERMINING ELIGIBILITY

In a community where a good interagency agreement has been implemented, staff from early intervention and early childhood programs will have had some discussion about the differences and similarities between the eligibility requirements of their respective services and programs, and about the procedures that they follow in determining eligibility.

The intent of this section of the interagency agreement is to make the process of eligibility determination less cumbersome, more family-friendly, and more likely to result in a well-informed decision about each child's eligibility. Transition planning by the sending and receiving programs or agencies will enable both sets of families—those whose children will continue to receive services after they turn three and those whose children will not—to plan ahead for the next phase in their children's lives. They will want to clarify the following issues:

Transition planning by the sending and receiving programs or agencies will enable both sets of families—those whose children will continue to receive services after they turn three and those whose children will not—to plan ahead for the next phase in their children's lives.

A. ASSESSING CHILDREN'S DEVELOPMENTAL PROGRESS

What: Good agreements specify that assessments will take place whenever possible in natural settings in which the child already participates (home, toddler group, child care). An interagency agreement addresses the nature of the information required by the receiving agency, the methods and locations where it will be collected, and parental consent. Some agreements may indicate whether assessments conducted by the early intervention agency may be used by the school district in determining a child's eligibility for services.

When: The team should identify and discuss the time frame in which assessments conducted by the sending program staff can be useful to the receiving program in making its determination of eligibility. Assessments of two year old children can become rapidly outdated.

Who: The following questions may guide discussion on this issue: Will the school district recognize assessments conducted by the staff of the early intervention program as valid for purposes of the multidisciplinary case conference (MDC)? Do they accept only selected, standardized assessments conducted by certified staff or will they accept a variety of assessments conducted by early intervention personnel? An interagency agreement offers an opportunity for sending and receiving staff to discuss and clarify these issues. Some agreements specify exactly which portions of the assessment will be conducted by the sending program and which by the receiving program. Others leave this issue to be worked out as each individual child's transition planning begins.

Results of testing and evaluations conducted after age 30 months by appropriately credentialed professionals will be considered current and not duplicated as part of the Case Study Evaluation.

— Mid-Illinois Local Interagency Council, Vandalia, Illinois

Sending and receiving agencies will coordinate a collaborative evaluation. This collaborative evaluation will serve as the exit evaluation of the sending agencies as well as the initial case study evaluation of the potential receiving agencies.

— McLean County Local Interagency Council, Bloomington, Illinois

How: Sending and receiving programs may agree that they will confer at a set time (for instance, at age 30 months) regarding eligibility determination of each child. At that time, they may exchange information about what assessments are on file or planned for the near future, and what additional assessments are required before age three. At this time, they can request the cooperation of the family and make arrangements for informed consent.

B. IDENTIFYING FAMILY CONCERNS, PRIORITIES, AND RESOURCES

What: The agreement will reflect the need to gather information about family resources, priorities, and concerns as they prepare for their child's transition and they start to think about their child's eligibility for continued services.

When: This can happen whenever the family and service providers begin thinking about the transition, but no later than three to six months before the child's third birthday.

Who: Some families are comfortable with the early intervention program staff conveying information on their behalf to the receiving program, while others prefer to convey the information themselves as one facet of developing a relationship with the new service provider. The agreement could specify that the early intervention program staff will check with the family as to their preference.

How: Some interagency agreements specify a joint home visit by the staff of early intervention and receiving agencies. Others include a visit by the family to the receiving program, whether a school district program or a community based preschool, before the child begins new services. This gives families the opportunity to provide information about their resources, priorities, and concerns to their child's

Some families are comfortable with the early intervention program staff conveying information on their behalf to the receiving program, while others prefer to convey the information themselves as one facet of developing a relationship with the new service provider.

new service providers, while still being supported by the current providers. A good interagency agreement will give families more than one choice about how to communicate with prospective providers.

C. CONVENING THE MULTIDISCIPLINARY CONFERENCE (MDC)

What: Federal law requires that eligibility for special education services be determined in a meeting that includes professionals from two or more disciplines who have assessed the child's development, the parents or guardians of the child, and anyone else whom the parents would like to invite. Referred to in the Individuals with Disabilities Education Act as the multidisciplinary conference (MDC), this meeting is colloquially known in various states and communities as a "staffing," a "case conference," or a "core evaluation." An interagency agreement clarifies at minimum who is expected to attend this meeting and how they will be notified.

A good interagency agreement will give families more than one choice about how to communicate with prospective providers.

When: A good interagency agreement will require that the MDC take place no later than one or two months prior to the child's third birthday. This time line gives families of eligible children time to prepare for the new setting, while giving families of children who are not eligible for continued services time to plan (with the help of the early intervention staff) for alternative educational and child care experiences. This time line also allows school districts adequate time to plan an appropriate individualized education program for each incoming student.

Who: The school district is legally obligated to convene the MDC. The interagency agreement should state that families' schedules and preferences should be taken into account when setting the time for the MDC. The agreement also should say that parents may invite whomever they wish to accompany them to the MDC, and that representatives from the early intervention program will be invited—with adequate notice—unless the family prefers that they not be present.

How: Parties to an interagency agreement can decide whether notification of meeting times and places and other communication in preparation for the MDC will take place through written communication, telephone calls, or other means, and specify this in the agreement.

Professionals will make every effort to be accessible to parents in order to share any information relevant to the MDC at least one working day prior to the MDC on parent request.

— Cass-Morgan-Scott Local Intervention Council, Jacksonville, Illinois

D. CONDUCTING THE CASE CONFERENCE

What: Federal and state laws authorizing special education services currently are based on a "deficit model" in which children's disabilities or developmental delays must be carefully documented and categorized. For this reason, many MDC meetings consist primarily of the assessment reports of professionals who have documented the academic, social, and physical abilities of the child as well as any special needs. A good interagency agreement will help to guide sending and receiving agencies toward more family-friendly case conferences that are nonetheless in compliance with state and federal laws and regulations.

When: Ideally, the multidisciplinary conference will be held 30-60 days prior to the child's third birthday. This time frame will allow all involved parties (families, children, and receiving programs) adequate time to plan for the child's new program.

Who: The MDC is convened by the school district. A representative from the LEA is charged with running the meeting.

How: Sending and receiving agencies should consider separating the MDC meeting, which determines the child's eligibility for special education services, from the IEP meeting, the meeting at which goals and objectives for the child are discussed, the IEP is drafted, and an appropriate placement determined. The MDC and the IEP are both legally mandated functions. However, they have been combined so frequently into one meeting, that many professionals and families have forgotten that they may be conducted independently of one another. There can be a real benefit to resolving the eligibility question at one time, and then coming back later to work on goals, objectives, and appropriate placement. When a child's eligibility for continued services has been unclear, or when a diagnosis of a disability has never been presented to a family before, it may be difficult for a family to focus on services which their child may need. Separating the MDC from the IEP meeting gives families additional time to think about their child's needs before they have to make a placement decision.

Sending and receiving agencies should consider separating the MDC meeting, which determines the child's eligibility for special education services, from the IEP meeting, the meeting at which goals and objectives for the child are discussed, the IEP is drafted, and an appropriate placement determined.

At the MDC, each discipline will share information regarding the child, and if eligibility is established, the parents will actively participate in the development of the Individualized Education Plan. The IEP meeting may be held at a later date.

— Local Interagency Council of Macon, Piatt, DeWitt, and Moultrie Counties, Decatur, Illinois

The agreement may include language that separates these two functions into separate meetings. In instances when there will be only one meeting, the agreement may provide ground rules to make the conference more family friendly. For example, the agreement may stipulate that the MDC will begin with a brief discussion of how the child is progressing in his or her current activities in the home or community, with input from the family and sending program staff. After that, the reports from members of the receiving program staff—who tend to be relatively unknown to the family and child—may be delivered.

5. PREPARING CHILDREN FOR THE TRANSITION

Talking about the new program in a positive manner, taking the child to meet the new teacher, and teaching the child skills that he or she may need in the new setting are excellent ways to prepare a child.

Transitions can be hard on everyone. For a young child with special needs, the transition from early intervention services to preschool services can be especially difficult. In addition to saying good-bye to one service provider and saying hello to an unknown service provider, many children are encountering a group setting for the first time. Some children have never been away from their families for an extended period of time, while others may find the bus that comes to get them unfamiliar and intimidating. It is not unusual for a child to feel anxiety about the change. Therefore, it is important that steps be taken to prepare the child for the transition. Talking about the new program in a positive manner, taking the child to meet the new teacher, and teaching the child skills that he or she may need in the new setting are excellent ways to prepare a child. Your interagency agreement should identify steps that agencies and families will take to prepare children for successful transitions.

A. PROGRAM VISITS

What: The agreement may specify that early intervention program staff will assist the family in identifying a range of receiving programs to visit (and accompany them if they wish). It may also specify that the purpose of such visits is to enable families to view a spectrum of options, but not to give them the right to select a specific classroom from among those of the very same type (e.g. parallel classrooms within a single agency or school). The agreement may also provide for the distribution of information to families about what to look for in an early childhood classroom.

Who: Parents should be encouraged to visit a variety of potential settings. Once a program has been selected, they should be encouraged to bring their child to visit the new setting. The child should be invited to explore the new setting and to interact with other children or staff. An interagency agreement can specify individuals from receiving programs to contact in order to arrange visits.

When: Program visits to potential sites may occur anytime in the 90-180 day planning period. Once a program has been selected, parents should feel free to bring

their child to visit the new setting. More than one trip may be required to help the child feel comfortable. Visits should be coordinated with a representative from the receiving agency to ensure that they occur at time that is convenient for both families and programs.

B. STAFF COMMUNICATION

What: Children benefit when practitioners in the sending and receiving settings share information about skills or experiences that may help children succeed in the new program.

When: Once a decision has been made as to the child's next placement, all parties to the agreement can commit themselves to facilitating communication between their respective staffs regarding that child's transition.

How: Parties to the agreement may offer release time to their staffs to communicate by telephone, through meetings, or visits, with staff from other programs. In addition to individualized communication regarding specific children, the agreement may call on receiving programs to make available to the sending programs and families print, video, or other types of general information that will offer guidance about the nature of their programs, the typical daily schedules, and behavioral expectations for children in their settings.

According to the law, eligible children who are three years of age cannot be put on waiting lists to receive preschool services.

6. SELECTING APPROPRIATE SERVICES AND IDENTIFYING WHERE SERVICES ARE DELIVERED FOR ELIGIBLE CHILDREN

Once a child's eligibility has been determined at the multidisciplinary conference, the team, which includes both parents and professionals, is faced with the task of determining appropriate services for the child. As stated previously in this manual, program services and placement can be determined at the MDC or it can be done later at a separate meeting. Key points to keep in mind regarding services and program selection are discussed below.

A. ENSURING CONTINUITY OF SERVICES

What: The IEP specifies services to be provided to meet the child's needs and the intensity and duration of service provision. Services can be provided in special education preschool classes, in the home, or in other programs. According to the law, eligible children who are three years of age cannot be put on waiting lists to receive preschool services. Remember, the intent of the law was to create a seamless system. Creative options must be explored. For example, school districts may provide services in community settings such as child care centers, preschools, or in the child's home. Districts also may reimburse the early intervention agency to continue providing services. The local education agency is legally and fiscally responsible for the

provision of services for three-year-old children. However, some states allow for flexible use of funds to ensure that services are not interrupted; in other places the LEA may contract with the early intervention program to continue services, if such services remain appropriate.

When: A child must begin receiving services specified in the IEP upon his or her third birthday. In instances when a child's third birthday occurs over the summer and personnel needed to conduct the case study evaluation and multidisciplinary conference are not available, the child's eligibility should be determined prior to the end of the school year. The IEP developed for this child will specify if the child needs extended school year services. For those children who do require extended school year, services must start on his or her third birthday. If extended school year services are not needed, services may begin at the start of the new school year.

Who: The local education agency has fiscal responsibility for ensuring that the child receive services.

How: Will vary from community to community based upon available resources.

B. COMPLYING WITH THE LRE REQUIREMENT

What: Federal law also requires that each child be educated in the least restrictive environment. According to the U.S. Department of Education's Office of Special Education Programs, this requirement may be met in one of three ways: (1) Participation at least part of the time in Head Start or another public agency serving preschool children; (2) Placement in a private setting that may or may not enroll additional children with disabilities; (3) Locating segregated classes for eligible children in regular elementary schools.[1]

When: LRE requirement should be considered when developing the IEP. Children who receive services in community placements should start receiving special education services on their third birthday.

Who: The multidisciplinary team and family responsible for developing the IEP must make the decision about what services are needed to address the child's needs, as well as the duration, intensity, and location of services.

How: The IEP should specify services to be delivered, their intensity and duration. The location of service delivery should be indicated.

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[1] Federal Register, March 14, 1988

If new service delivery location is a nonspecialized least restrictive environment, develop a plan whereby either the sending organization, receiving organization, or both take responsibility for conducting initial in-service training and providing ongoing services such as consultation, clinical services, and staffing at the site where the child will be served.

— First Steps Council, Tippecanoe County, Indiana

C. ADDRESSING FUNCTIONAL SKILLS

Functional skills are those skills that will help the child achieve success in the new setting. These skills are defined by the new environment. For example, in one setting children may be expected to toilet independently. In another setting, it may be important that children be able to participate in group activities. Other functional skills include: taking off coat, caring for personal belongings, sitting in seat, and following one or two step directions.

How: Functional skills are determined prior to the transition by examining the new setting and determining important skills that the child will benefit from learning.

When: As soon as eligibility for services is determined.

Who: A representative from the sending program and a family member who knows the child well should visit the receiving program. They should observe other children in the program as well as talk to the receiving staff to learn about skills that may be important for a child to have. Ideally, a representative from the receiving program should visit the child in his or her current program to learn how the child functions in that environment. In conjunction with the child's parents, the staff at the sending program should decide upon specific goals and objectives to prepare the child. While the parents may elect to work on these skills, the sending agency is responsible for addressing skills that will facilitate the child's transition. Likewise, the ways in which the receiving program can make accommodations and adaptations to facilitate the participation of a young child with special needs also should be discussed and considered.

New functional skills may be needed for the child to feel comfortable and be successful in the new environment(s) and/or with new people. Visiting playgrounds, gradually spending more time away from parents, carrying a backpack, and learning to ride in a van or bus are examples of experiences that may be included in Transition plans.

— Mid-Illinois Local Interagency Council, Vandalia, Illinois

7. MONITORING THE AGREEMENT

An interagency agreement can be thought of as a policy or set of working procedures that includes, but also transcends, the individual agencies that it is designed to help organize. The maintenance of the agreement is shared by each individual designated to carry out any part of the agreement and the responsibility for monitoring is shared.

Interagency agreements are more likely to succeed the more public they become. The community being served can recognize the efforts of the individual agencies who have collaborated on the agreement and can support and monitor how well they carry out the tasks that the agreement spells out.

What: (1) Mechanisms for obtaining feedback from individuals who have a vested interest in the agreement can be identified. Parents, early intervention providers, public school teachers and administrators, and staff from preschools and child care facilities should all provide feedback which is critical for evaluating the success of the agreement. (2) Methods for gathering information include: surveys, interviews, questionnaires, record review, and informal observations.

Who: Many interagency agreements are written by transition teams which have been formed as a subcommittee of their local interagency council, developed by the state Part H system. This team should continue to meet regularly after the interagency agreement has been written and signed to monitor both the effect of the agreement on transitions and community adherence to the tenets of the agreement. This team should periodically report their findings to the local interagency council, reporting on what aspects of the agreement are working, as well as identifying aspects that are troublesome. If a community does not have a local interagency council, other public forums should be considered to promote awareness and accountability to the goals of the agreement. These public forums may consist of parent-teacher organizations, special education advisory teams, or human service councils.

When and How: Shortly after the agreement is signed, the transition team should disseminate copies of the agreement to important stakeholders, especially parents and direct service staff.

The transition team should continue to meet regularly, at least three or four times in the first year, to monitor the different tasks written into the agreement and to problem solve any difficulties that may arise. The keeping of minutes will assist in the documentation of these issues and the recording of team decisions.

At least once a year, families of children who have made the transition from early intervention should be surveyed in order to gain families' perceptions on how the agreement is working. Service providers from both sending and receiving

If a community does not have a local interagency council, other public forums should be considered to promote awareness and accountability to the goals of the agreement.

agencies also should be surveyed. A sample questionnaire for use with families is included in Appendix C to this manual. Once this information is gathered, team members need to report their findings and any recommendations that they may have to the local interagency council or other appropriate public body. This information ought to be considered before the agreement is signed for another year.

An Interagency Linkage/Transition Committee, consisting of a minimum of one parent, a local interagency council representative, and representatives of each participating referring and receiving agency, will be formed as a standing committee of the Birth-Through-Five Interagency Council of Coles, Cumberland, Douglas and Shelby Counties. The Committee shall meet no less than annually to review, monitor and recommend amendments to the terms of this agreement, estimate the numbers of children who will be leaving early intervention services during the coming year, identify new providers that might be included in this agreement, and to evaluate family satisfaction with the transition process.

— Birth-Through-Five Interagency Coordinating Council of Coles, Cumberland, Douglas and Shelby Counties, Charleston, Illinois

Six weeks after the third birthday, the referring agencies will deliver the committee's transition satisfaction survey to the family with a postage paid envelope addressed to the LIC coordinator for its return.

— Mid-Illinois Local Interagency Council, Vandalia, Illinois

DEVELOPING AN APPENDIX OF BEST PRACTICES

As you draft your agreement, you will discuss many good ideas regarding transition. However, your team may not feel that all parties to the interagency agreement should be obligated to carry out each of these ideas or practices. Instead, we recommend listing them in a "best practices appendix." Ideas we have seen in best practice appendices include:

- Developing a standard form for all early intervention agencies to report potential numbers of children to the local education agencies.
- Devising a format for assessing parent satisfaction with the transition process.

- Sending a joint birthday card from the early intervention agency and the local education agency on the child's second birthday.
- Recommending that each transition team develop a list of potential service options to distribute to parents prior to the transition.
- Designing a transition workshop to teach parents how to prepare for the event. Workshops can be jointly developed and held by the early intervention agency and the local education agency.
- Providing children with the opportunity to visit the new placement before the actual start date.
- Offering toddler play groups through the early intervention agency to give children who are going to preschool an experience in a group situation.

GETTING THE AGREEMENT SIGNED

Once the team agrees to the language and intent of the agreement, the next step is getting it signed. This can be a formidable task. Programs often send individuals directly involved in providing or coordinating services to represent them on the transition team. They may not have the authority to actually sign the agreement. The individuals with the authority to sign the agreement often include program directors, school district superintendents, special education directors, and organization presidents. Each member of your team has worked hard to represent the interests of your program. You have kept your superiors informed of the progress. Possibly you have taken them previous drafts for feedback. Nonetheless, you may find that despite your best efforts, someone refuses to sign the agreement unless certain language is changed. If this happens, you will need to reconvene the team to discuss and approve the change and alert any previous signers of the change that is being requested. All parties must agree to the change before it can be implemented. This can be frustrating to those of you who have invested much time and effort in writing the initial agreement. The coordinator of your local interagency coordinating council can be very helpful in taking the agreement back and forth among parties. Your agreement may circulate several times before all parties agree to sign. Once agreement is achieved, we recommend that you organize a signing party; invite the transition team and everyone involved to sign. If you have an LIC you may want to invite the other members. By having a party, you are celebrating your accomplishment while publicly acknowledging the significance of the agreement. Folks we know in Marion County, Indiana had a wonderful signing party at the Children's Museum in Indianapolis!

You may find that despite your best efforts, someone refuses to sign the agreement unless certain language is changed.

All parties must agree to the change before it can be implemented.

Come Celebrate with Us!

Celebrate the Interagency Agreement on Transition among Early Intervention Programs and Marion County Public School Corporations.

Tuesday, December 6, 1994
3:00 p.m. - 5:00 p.m.
Indianapolis Children's Museum
Activity Rooms 201 & 203
3000 N. Meridian Street

Ceremony will begin at 3:30 p.m., with refreshments following

R.S.V.P. by calling Sarah Steenrod at (317) 466-2006 by November 18.

APPENDICES

This appendix contains the worksheets that you will use in writing your interagency agreement. These worksheets are perforated so you may pull them out and use them. Information included in these appendices include:

APPENDIX A Glossary of Terms
APPENDIX B Worksheets Used in FACTS/LRE Workshops
APPENDIX C Transition Practices Evaluation Worksheet
APPENDIX D Steps to Transition Worksheet
APPENDIX E Sample Transition Timeline
APPENDIX F Sample Interagency Agreements

GLOSSARY OF TERMS

This glossary is provided to acquaint the reader with terminology which may not be familiar. Many communities find that it is helpful to have a glossary in their interagency agreement.

EARLY INTERVENTION - Services for disabled infants and toddlers (birth through two years of age) and their families. Early intervention services may include, but are not limited to the following: special instruction for the child, service coordination, family counseling and/or training, social work services, health services, medical services, audiology, speech therapy, occupational therapy, and physical therapy. Early intervention services are funded under Part H of the Individuals with Disabilities Education Act (IDEA). Children are eligible for early intervention services if they exhibit developmental delays or have a diagnosed physical or mental condition that has a high probability of resulting in developmental delays in the following areas: cognitive skills, social/emotional skills, adaptive behavior, communication skills, physical skills. Early intervention services are frequently delivered in the home.

ELIGIBLE - Child meets certain requirements to qualify for services.

IDEA - Individuals with Disabilities Education Act. Formerly known as Public Law 94-142, Education of the Handicapped Act. IDEA is a federal law that guarantees the delivery of special education services to all students with disabilities ages 3 through 21. The provisions of IDEA stipulate that each student receive the following: 1) free appropriate education, 2) an education in the least restrictive environment, 3) related services, 4) fair assessment.

INDIVIDUALIZED EDUCATION PROGRAM - A written educational plan for a student receiving special education services. The provisions of IDEA require that every child with a disability has his or her own IEP which includes statements of present level of functioning, annual goals, short term instructional objectives, specific educational services needed, dates of service, participation in regular education programs, and procedures for evaluating the child's progress on the IEP. The IEP must be signed by the child's parents/legal guardians and the educational personnel working with the child.

INDIVIDUALIZED FAMILY SERVICE PLAN - A written plan for each infant and toddler receiving early intervention services. Public Law 99-457 requires that all children receiving early intervention services have an IFSP. In addition to containing goals and objectives for the child, the IFSP includes a statement about the family's strengths and needs related to the child's development. The IFSP must be amended 90 days prior to the child's third birthday (180 days in some states such as Illinois) to include goals and objectives related to transition.

INCLUSION - The practice of including children with disabilities in settings/activities that are appropriate for their non-disabled peers.

INFORMED CONSENT - Informed consent means that parents/guardians have the opportunity to review the information that will be provided to the receiving agency and consent to its release. Parents must sign an informed consent form before any information is released. Informed consent must be in the parents' first language.

LEAST RESTRICTIVE ENVIRONMENT (LRE) - An eligible child's LRE requirement may be met in three ways: (1) Participation at least part of the time in Head Start or another public agency serving preschool children; (2) Placement in a private setting that may or may not enroll additional children with disabilities; (3) Locating segregated classes for eligible children in regular elementary schools.

LOCAL EDUCATION AGENCY (LEA) - School district that is responsible for providing special education services to students with disabilities.

LOCAL INTERAGENCY COORDINATING COUNCIL (LIC) - Public Law 99-457 mandates interagency collaboration at the state and federal level. In many communities, local interagency councils have been established to assist in implementing Part H legislation. Councils are typically made up of representatives from various agencies in the community who provide services to disabled infants and toddlers and their families.

MULTIDISCIPLINARY CONFERENCE (MDC) - Federal law requires that eligibility for special education services be determined in a meeting that includes professionals from two or more disciplines who have assessed the child's development, the parents/guardians of the prospective student, and anyone else whom the parents would like to invite. Referred to in the IDEA as the multidisciplinary conference (MDC), this meeting is colloquially known in various states and communities as a "staffing," a "case conference," or a "core evaluation."

PART B - That part of the Individuals with Disabilities Education Act that provides for services for disabled children and youth from age 3 through age 21.

PART H - That part of the Individuals with Disabilities Education Act that provides early intervention services for disabled infants and toddlers and their families.

PLACEMENT - The site where a child receives special education services. Schools are required to provide a continuum of placement options. For a preschooler with special needs, these options may include a community program such as Head Start, a private child care or nursery school, or a segregated early childhood special education classroom. Decisions regarding placement are made at IEP meetings.

PUBLIC LAW 99-457 - Federal law passed in 1986 that extended special education services to infants, toddlers, and preschoolers with disabilities. P.L. 99-457 was reauthorized in 1991 and is now known as the Individuals with Disabilities Education Act (IDEA).

REFERRAL - A formal request to test a child to determine if he or she is in need of special education services. Referrals must be performed by a multidisciplinary team.

RECEIVING AGENCY - Agency/program that "receives" a child after he or she exits early intervention services. In many instances this will be a program run by the public school. However, a community based preschool or child care may also be a potential receiving agency.

SENDING AGENCY - Early intervention program. Also known as the referring agency.

TRANSITION - A change from one environment or service delivery model to another (e.g., leaving early intervention services and entering preschool); moving from one activity in a classroom to another.

COMPONENTS OF INTERAGENCY AGREEMENTS ON TRANSITION

Purpose statement

Transmission of information from sending to receiving agencies

Discussion of transition issues with families and support for families in the transition process

Determination of eligibility

Selection of program for eligible children

Preparing children for their transitions

Mechanism for monitoring the agreement

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PURPOSE STATEMENT

Whom will the interagency agreement serve?

What will the interagency agreement do for these people?

What values guide or underlie our activities?

[FACTS/LRE grants permission for photocopying of this handout.]

TRANSMISSION OF INFORMATION FROM SENDING TO RECEIVING AGENCIES

Agreements must specify when and how each of these will take place and who is responsible:

- Obtaining consent to release information

- Forwarding names of potentially eligible children

- Forwarding more detailed information (IFSPs, evaluations)

- Discharge reports

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DETERMINATION OF ELIGIBILITY

Agreements must specify when and how each of these will take place and who is responsible:

- Assessments of children--parental consent, nature of information required, timeline that must be followed, restrictions (if any) on credentials of those conducting assessments

- Assessments of family concerns, priorities, resources

- Convening the multidisciplinary case conference--who gets invited, how are they notified and with how much notice?

- Conducting the case conference--how is input solicited and shared?

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PREPARING CHILDREN FOR THEIR TRANSITIONS

Agreements must specify when and how each of these will take place and who is responsible:

- Visits to new settings (by parents without children? with children? etc.)

- Communication between direct service staff from sending and receiving agencies (e.g., to identify skills or experiences that may help children succeed in next care or education setting)

- Support for acquiring skills and experiences that have been identified as important in the receiving program

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SELECTION OF PROGRAM PLACEMENTS FOR ELIGIBLE CHILDREN

Agreements must specify when and how each of these will take place and who is responsible:

- Ensure continuity of services

- The LRE requirement is met by cultivating collaborative relationships with community settings, which may become the sole placement option for some students, or one part of a dual placement

- IEPs reflect functional skills important in the new setting

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MECHANISM FOR MONITORING THE AGREEMENT AND WHETHER PEOPLE ARE CARRYING OUT THEIR COMMITMENTS

Agreements must specify when and how each of these will take place and who is responsible:

- From whom will feedback on interagency cooperation be obtained (and by what means)? Teachers, direct service providers, parents, agency directors, school administrators?

- Providing feedback, both positive and negative, on whether the commitments in the agreement are being carried out

- Feedback, both positive and negative, on the usefulness of the various provisions in the agreement, the need for adding, subtracting, and amending it

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TRANSITION PRACTICES EVALUATION WORKSHEET

1. Did the staff of the early intervention program inform you of the age three transition at least three months prior to your child's third birthday? Y N

2 Did your child have a written transition plan? Y N

3. Did you meet with someone to develop the transition plan? Y N
   If yes, with whom did you meet?

4. When was the transition plan developed?

5. Did the transition plan include dates and timelines for changing programs? Y N

6. Did the plan include evaluations for determining your child's eligibility for continued services? Y N

7. Did the plan include ways that service providers would prepare your child for the change? Y N

8. Did the plan include suggestions for ways that you as parents could prepare your child for the change? Y N

9. Was your child's MDC held at a time that was convenient for you? Y N

   Were you able to invite individuals of your choice to accompany you? Y N

10. Did you receive information about school district programs that your child might attend? Y N

11. Did you receive information about community programs such as Kindercare or privately run preschools? Y N

12. Did you visit the new program before the transition? Y N

13. Did you visit any other programs when deciding where to send your child? Y N

14. Did you take your child to visit the new program before the transition? Y N

15. Did preschool services start immediately after early intervention ended? Y N
    If no, how long did you have to wait?

    Why did you have to wait?

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16. Did you feel as if you had a say in the selection of your child's preschool program?

17. Did you feel as if you had a say in the timing of your child's transition?

18. What was most helpful about the transition process?

19. What was least helpful about the transition process?

20. Do you have any advice for either the early intervention program or the receiving program in regards to transition?

STEPS TO TRANSITION

1. First Steps[1] agency gives family formal written information about transition process and rights.
2. Transition Plans are written into IFSP by family and First Steps agency.
3. Family will sign the "Consent to Release of Information" forms for release of any information appropriate for public school or other receiving agency.
4. Family may send to public school, or other receiving agency, any information or records from sources other than the receiving agency (i.e., medical records, vision/hearing status).
5. First Steps agency sends to the public school district or receiving agency its records and a copy of the birth certificate as well as immunization records of the child.
6. The public school district personnel may attend a meeting with the family on transition.
7. Families may visit preschool programs in their school district.
8. Public school staff reviews records received and determines the need for any additional evaluation. If evaluation is needed, the public school will schedule with the parent.
9. The case conference with the public school district is scheduled when all evaluations are completed.
10. Eligibility and service delivery are determined at the case conference.
11. Parent/guardian signs the permission for special education placement in public school.
12. Public school programs begin at the child's third birthday.
13. The First Steps agency will do a follow-up contact with the parent/guardian.

— Marion County First Steps Council, Indianapolis, Indiana

[1] ***First Steps*** is the name the State of Indiana has adopted for its local councils of service providers and families of young children. ***First Steps*** is part of a larger initiative for children from birth through adolescence, referred to as ***Step Ahead***.

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SAMPLE TRANSITION TIMELINE

This sample transition timeline identifies what steps will be followed in transition, who is responsible for each step in the transition process, and when each step will be accomplished. This includes steps that are required by law as part of the IFSP and steps that are options to consider when developing a transition plan.

Date	Responsibility	
_____	_____	Hold first planning meeting to begin the transition process.
_____	_____	Develop a transition plan and provide information concerning child and parent rights.*
_____	_____	Identify goals and methods to prepare the child and family for transition.*
_____	_____	The family provides consent for release of information to public school and other programs or services.*
_____	_____	Identify necessary evaluations to determine eligibility for continued special education services and conduct evaluations.*
_____	_____	The transition team discusses eligibility for continued special education services and other issues related to transition, and identifies future program options (MDC meeting).*
_____	_____	Members of the transition team visit program options.
_____	_____	If the child is eligible to receive special services, the transition team writes the IEP and identifies new program(s) and services.
_____	_____	The family and child visit the new program, meet with the teacher and related services staff.
_____	_____	The early intervention staff transfers records and contacts the new program staff to exchange information.*
_____	_____	The child starts the new program on the eligible or agreed upon date.*
_____	_____	The family meets with the new program staff to assess child adjustment.
_____	_____	Early intervention and the new program staff evaluate the transition process, including child adjustment and family satisfaction.

Steps that are required as part of the IFSP appear with an asterisk.

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LIC OF WILL & GRUNDY COUNTIES DRAFT OF TRANSITION AGREEMENT

Time period covered by this agreement: 8/1/1995 -- 7/31/1996
This agreement will begin on August 1, 1995 and will be reviewed and renewed annually.

Agencies:
School Units with Special Education Programs (Grundy County Special Education Cooperative, Indiana Prairie District 204, Joliet District 86, Lincoln-Way Special Education Cooperative, Lockport Area Special Education Cooperative, Southern Will County Special Education Cooperative, Valley View District 365U)
Easter Seal Rehabilitation Center of Will & Grundy Counties
Good Shepherd Center
Little Friends Center

I. Purpose:
To facilitate the transition between early intervention services and services available to 3 year old children with special needs and their families.

We recognize that the transition between early intervention to early childhood services can often be a difficult and confusing period of change for children and their families. We believe that this transition process should be centered around the child's best interests. We further believe that the families with their needs and aspirations play an integral role in transition planning.

To expedite this transition we recognize the central role of communication and collaboration between referring and receiving agencies. Communication and collaboration are essential to avoid duplications and gaps in services.

II. Procedures:
Transmission of Information:
1. The Early Intervention Provider will obtain a written referral and consent to release information by the age of 24 months.

2. The Early Intervention Provider will forward a list including birthdays and residences of potentially eligible children (those turning 3 during the upcoming school year). This list will be forwarded to the Local Education Agency (LEA) by February 1 and updated on June 1.

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3. The Early Intervention Provider will forward all current evaluation reports/assessments and Individualized Family Service Plans (IFSPs) at the time of the referral (30 months of age) to the LEA. Subsequent reports will be forwarded. Once the child reaches 30 months of age, the Early Intervention Provider will send notices of staffings, to appropriate early childhood personnel. LEA personnel are encouraged to send a representative to these staffings.

4. The Early Intervention Provider will forward a discharge report to the LEA, subsequent to the child's discharge from services.

III. Transition Process:

1. At least once yearly the LIC of Will & Grundy Counties will provide a workshop for families and agencies on the transition process.

2. a. The Early Intervention Provider will acquaint the family with procedures, issues, and legal rights at each IFSP meeting.
   b. A transition plan will be completed at the staffing nearest to the child's second birthday.
   c. At the 30 month meeting the Early Intervention Provider will review the procedures, issues, and legal rights with the family. This meeting will help families: identify the roles they wish to play, identify issues that are important to them, update transition plans on the IFSP, help families become familiar with the range of programs for which the child may be eligible.

IV. Determination of Eligibility

1. Parental consent is required to initiate the case study evaluation process. The LEA has the responsibility for determining eligibility in accordance with the school code.

2. Multidisciplinary Conference (MDC) Notification:
   a. The process of the MDC will be discussed with the parents at the IFSP meeting held six months before the child turns age 3.
   b. At least ten days prior to the MDC, the LEA will send notice in writing of the conference meeting date, time, and location, and a list of those who are invited.
   c. Parents will be informed that they may invite whomever they wish to the MDC.
   d. The sending agency will also be invited in writing.

3. In accordance with Multidisciplinary Conference/Individual Education Plan (MDC/IEP) procedures, each participant will be given opportunity to give input to the discussion and to the team decision regarding the child's eligibility, services and/or placement.

4. If the child is ineligible for special education services, the LEA and releasing program will provide information to the family regarding other options available in the community. The family will receive dates of future child screenings from the LEA so that their child's development may be assessed again at a later time.

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V. Selection of Program Placements for Eligible Children

Ensure Continuity of Services

1. The LEA is responsible fiscally and programmatically for ensuring that eligible children receive special education services, following their third birthday.
2. The transition of children who turn age 3 during the fall or spring of a given school year has proven to be problematic. When feasible, children who turn age 3 during September may begin the school year prior to their birthday. If a child turns 3 in the spring, the Early Intervention Provider and the LEA will collaborate to provide continuity of services.
3. Functional skills important for participation in the new settings will be addressed in the transition plan of the IFSP.
4. A natural transition time may be the first day of the summer term or the fall term, depending on the child's needs as determined by the IEP. Determination of which funds will be used to support these services will be worked out between the LEA and Early Intervention provider.

Collaborative Relationships

The continuum of program options for families should reflect collaborative relationships with community based programs (e.g., Head Start, community day care/preschools, Park Districts, YMCA's, etc.) as outlined in the transition plan provisions of the IFSP.

VI. Preparing Children for Their Transitions

1. The referring agency will include (as appropriate) on the IFSP, functional goals that may assist the child in a smooth transition to the receiving agency. These goals may include visiting schools and/or program sites, creating play group experiences, anticipating scheduled changes, or other suggestions to assist parents in preparing children for the change. The transition committee of the LIC will assist in the development of materials that may help parents and staff in providing a smooth transition for the child.

2. With parent permission, staff providing direct services in the Early Intervention program may share information with preschool service staff about the child's needs and adjustment prior to and following the transition.

VII. Mechanism for Monitoring the Agreement

1. A transition committee, consisting of at least one parent and representatives of participating agencies, will be formed as a standing committee of the LIC of Will and Grundy Counties to discuss and monitor the agreement.

2. A committee will meet at least once per year. Members of the committee, through the LIC, will collect data from participating programs and from families who have experienced the transition regarding their satisfaction with the process. At any time, pertinent information may be brought to members regarding this agreement.

3. The transition committee will report to the LIC the results of data collected and/or problems brought to their attention. Members of the committee may propose changes in the agreement and explain their rationale for these changes.

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M. C. L. I. C.
McLEAN COUNTY
LOCAL INTERAGENCY COUNCIL
INTERAGENCY AGREEMENT FOR TRANSITION

I. Purpose Statement

The intent of this agreement is to assure that a family-focused and systematic process is designed and operationalized for McLean County. The purpose of this system will assist families in their transition from early intervention (birth-to-three) services to other early childhood (three to five) services. This agreement will be based on:

a. The participation and support of families in the transition process.
b. Individual family decisions.
c. Collaboration through communication and the efficient use of resources.
d. Commitment to explore and/or expand services in natural settings appropriate for each child.
e. Quality and timely services.
f. Meeting eligibility requirements of participating agencies.

It is intended that this agreement be reviewed and revised annually in order to meet the needs of children/families in McLean County.

II. Effective and Renewal Dates Covered by This Agreement

This agreement will begin effective May, 1995 and will be reviewed annually thereafter.

III. Transition Procedures

The sending agencies will be responsible for the following events which will take place at 2 years 6 months of age:

a. Acquaint families with the MCLIC Family Transition Folder and alert families of the currently available transition workshops and classes. (Appendix A to follow when complete.)
b. Provide families the opportunity to view available videotapes of various public school early childhood classrooms, private preschools, Head Start, day cares, and public programs, e.g., YWCA, library, etc. . . . .
c. Obtain parent/guardian signature on the "MCLIC Authorization to Exchange Information" form, and retain this form.
d. Submit child's initials, birthdates, strengths, and areas to develop on the "MCLIC Birth to Five Referral" form to the potential receiving agencies.
e. Assist families, as appropriate, in actual site visits to potential settings on a case by case basis.
f. Have the IFSP amended with families to reflect transition goals and objectives.

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The following events will take place at 2 years 9 months of age:

a. Families have indicated which 3-5 receiving agencies and settings they believe to be potentially appropriate for their child.
b. Sending agencies submit the MCLIC Transition Packet to the identified potential receiving agencies at the monthly MCLIC Student Exchange Meeting. Included in this packet will be the MCLIC Authorization to Exchange Information; Transition Referral form; current IFSP; and ISBE Initial Case Study Evaluation Consent. However, if a child reaches 3 years of age during July, August or early September, the Transition Packet will be submitted at the April MCLIC Student Exchange Meeting.
c. Sending and receiving agencies will coordinate (schedule date, place and staff to be present) a collaborative evaluation. This collaborative evaluation will serve as the exit evaluation of the sending agencies as well as the initial case study evaluation of the potential receiving agencies.

The following events will take place between 2 years 10 months and prior to age 3:

a. The sending agencies will submit the MCLIC Social Development Study and narrative report to the receiving agencies.
b. The sending/receiving agencies will complete a collaborative evaluation which will include an exit evaluation of the sending agencies as well as the initial case study evaluation of the potential receiving agency.
c. The sending and receiving agencies will encourage child visits to potential settings.
d. The receiving agencies will send families the "Parent Guardian Notification of Conference" form indicating the purpose of convening.
e. The exit IFSP; initial MDC, determining eligibility and initial IEP meeting(s) will be convened collaboratively. The exit IFSP, the initial MDC and initial IEP documents will be completed based on the collaborative evaluation.
f. The receiving agencies will commence services upon the child's 3rd birthday. However, if a child turns 3 during a school vacation, services will commence when school resumes.

It is understood that these are recommended timelines for events to occur to ensure that legal obligations are met. Should there be a need to alter these timelines, agreement will be reached between the individual family, sending/referring agency and school district involved.

IV. Mechanisms for Evaluating This Transition Process

The following events will take place 3 months after the child's transition into the receiving agency. The Transition Committee will:

a. Use the MCLIC Birth-to-Five Referral Form to identify children/families who have enrolled in 3-5 settings.
b. Survey families/service provider(s) utilizing the MCLIC Family/Service Provider(s) Transition Survey tools.
c. Review the MCLIC Birth-to-Five Referral Form to assure all procedures have been completed for an effective transition for children/families.
d. Gather on a semiannual basis, the report of findings from the above documents. Results will be analyzed yearly, and proposed changes will be implemented if needed.

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ROCK ISLAND/MERCER COUNTY LIC

PURPOSE STATEMENT

The intent of this agreement is to provide a continuum of services for families with children birth through five who are eligible to receive early intervention services residing in Rock Island and upper Mercer County school districts including the following: Moline #40, Rock Island #41, Riverdale #100, Hampton #29, Silvis #34, Carbon Cliff #36, Aledo #201, Rockridge #300, Sherrard #200, East Moline #37, and Westmer #203.

This agreement will establish predictable guidelines for agencies to follow. Our commitment is to keep each other well informed, to avoid duplication of effort, to close gaps in service delivery, and to ensure that needs and aspirations of families and children are at the center of each child's transition.

Throughout this agreement, reference will be made to the referring agency and the receiving agency. For the purposes of this agreement, the referring agencies include but are not limited to the following:

Birth to Three of the Association for Retarded Citizens of Rock Island County (0-3)
Easter Seal Foundation (ESF)
The Division of Specialized Care for Children (DSCC)
Black Hawk Area Special Education District Parent Infant Education Program (BHASED)
Trinity Rehabilitation Services

The proposed receiving agencies for this agreement will be but are not limited to:

Moline School District #40
Rock Island School District #41
Riverdale School District #100
Hampton School District #29
Silvis School District #34
Carbon Cliff School District #36
Aledo School District #201
Rockridge School District #300
Sherrard School District #200
East Moline School District #37
Westmer School District #203

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SECTION I

ACQUAINTING FAMILIES WITH PROCEDURES, ISSUES, AND RIGHTS

Initially informing the family

It will be the responsibility of the referring agency to inform the family about the transition that may take place when a child turns three years of age. Information will be provided from the time the child first begins receiving early intervention services and will continue periodically as the time for the transition draws nearer.

Providing more formal information to the family

Parents will receive information from the beginning of service delivery by the Early Intervention (EI) provider. This information will include available training and workshops on transition offered locally as well as alternative community resources/services. This information will be confirmed in writing and/or pamphlet form. The receiving district will conduct a thirty month conference which can occur either via telephone or face to face contact. At this time the parents' rights and responsibilities will be fully explained. In addition to a verbal explanation, the parents will receive information regarding their rights in writing through the provision of the Illinois State Board of Education's "Explanation of Procedural Safeguards Available to Parents of Children with Disabilities" and "A Parent's Guide: The Educational Rights of Students with Disabilities." Also, a copy of this agreement will be given to the parents to review. This information will be provided in the parents native language or other appropriate mode of communication used.

Information regarding the school district's continuum of programs will be shared at the thirty months conference and eligibility criteria will be reviewed.

Amending Individual Family Service Plans (IFSPs) to include transition plans

IFSPs will be amended to include transition plans when the child turns thirty months. Parents will work jointly with the transition team to develop the plan.

SECTION II

TRANSMISSION OF INFORMATION FROM REFERRING TO RECEIVING AGENCIES

Forwarding names of potentially eligible children for "Child Find"

To comply with federal guidelines for schools, the referring agency will request parental consent to release information to the receiving agency about the child's name, address, date of birth, and suspected disability as soon as the child begins early intervention.

The "Child Find" list will be updated and reviewed monthly. Referring agencies and names will be removed when children are no longer eligible to receive Early Intervention (EI) services.

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Forwarding more detailed information

By the age of thirty months, the referring agency will set up an initial meeting between parents, educators, and early intervention providers. Also, by this time a consent to release the most recent Individualized Family Service Plan (IFSP), the assessment summary, and developmental assessments completed at or near thirty months will be obtained. Related service evaluations performed by the referring agency as well as any other information that the parents wish to include from said agency will be forwarded. Parents have the option of obtaining and including independent evaluations.

To insure informed consent, parents and guardians will have the opportunity to review exactly what will be shared with the receiving agency. This will be communicated to parents and guardians in their primary language. Parents and guardians will be invited to add or rescind information that they would like to send to the receiving agency. Parents will be informed about how to rescind the release form at any time.

Forwarding information not generated by the referring agency

Related service evaluations not performed by the referring agency cannot be legally re-released. The referring agency will ask parents to sign the receiving agency's consent form so that the receiving agency can directly request and obtain these evaluations. These consent forms will also be forwarded at age thirty months.

Final review of the IFSP

A summary report will be available at the Multidisciplinary Case Conference (MDC) to update the child's progress on the latest Individualized Family Service Plan (IFSP). A representative(s) from the early intervention agency will be invited to attend the MDC.

SECTION III

THE MULTIDISCIPLINARY CASE CONFERENCE

Convening the multidisciplinary case conference (MDC)

Once all of the components of the case study evaluation have been completed, a multidisciplinary conference will be held prior to the child's third birthday to discuss the results of the case study evaluation and determine eligibility for special education programs and/or related services. The receiving district must provide written notification of the conference at least ten calendar days prior to the meeting. This notification will include the scheduled date and time, location, purpose, and participants. Participants should include but not be limited to the following individuals: the parents or guardians, representative(s) of the referring agency, representative(s) of early intervention agencies that have been involved with the child, those individuals who may provide services to the child, those individuals involved in the case study evaluation, and a local education agency (LEA) representative. Parents should be reminded by the early intervention (EI) provider of their right to bring friends or support members to the MDC. If the parent cannot attend, the district will attempt to reschedule the

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meeting at a mutually agreed upon time and date. In addition, the district will provide interpreters at the meeting for parents who do not speak English or are hearing impaired.

SECTION IV

SELECTION OF PROGRAM PLACEMENTS FOR ELIGIBLE CHILDREN

The Multidisciplinary Conference (MDC) establishes the child's eligibility for special education programming. For children found eligible, the Individual Education Plan (IEP) must be developed and implemented by the child's third birthday. The IEP meeting may or may not occur at the same time as the MDC. Resources immediately available may not match all needs identified in the child's IEP. When this happens, the participants at the IEP will:

1. Review the information about the child's needs;
2. Initiate or continue with services currently available through the school district in relation to the child's needs;
3. Determine on a case-by-case basis an individual interim plan to provide services for the remainder of the semester and/or summer.

If a child reaches age three during the summer, extended school year eligibility needs to be determined and must be based on the individual needs of the child, the anticipated degree of learning lost by the child over the summer, and the projected length of time necessary to relearn previously acquired skills or information. Otherwise, the date of initiation of services could be the beginning of the upcoming school year.

SECTION V

PREPARING CHILDREN AND THEIR FAMILIES FOR THEIR TRANSITIONS

Functional goals

The referring agency working together with the family will include (on the transition plan) functional goals that assist the child and family in a smooth transition. Examples of functional goals may include visiting the school classroom, the playground, creating play group experiences, anticipating schedule changes, and other tips to assist parents in preparing their child for change.

Visits to new setting(s)

At thirty months, the referring agency will contact the receiving agency to schedule an appointment with school staff. Following this referral, the referring agency may offer to accompany parents on visits to these potential program sites. Parents may invite a support person to accompany them on these visits.

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Communication between direct service staff from referring and receiving agencies

An open line of communication between referring and receiving agency staff will be maintained. Early intervention specialists will follow each child's new placement after the transition with a phone call or visit. With parent permission, the classroom teacher may call early intervention specialists to discuss problems in a child's adjustment to a new setting.

SECTION VI

MECHANISMS FOR MONITORING THE AGREEMENT

A transition committee, consisting of no less than one parent and representatives of participating referring and receiving agencies will be formed as a standing committee of the Local Interagency Council (LIC) of Rock Island and Mercer Counties to review and monitor the agreement.

A family satisfaction survey (Appendix A) will be developed by the committee and distributed by the early intervention (EI) providers. These surveys will be reviewed by the LIC committee twice a year. Parties to the agreement may bring to the attention of committee members at any time information as to whether the letter and spirit of the agreement is being respected and carried out.

The transition committee will report to the Local Interagency Council (LIC) the results of data collected and/or problems brought to their attention. Members of the committee may propose changes in the agreement and explain their rationale for these changes. These changes may be motioned and voted upon by LIC members. If there are no changes to the agreement, the agreement will be formally reaccepted by participating members every two years.

Appendix A

FAMILY SATISFACTION SURVEY

Please help us to evaluate our transition plan so that we are better able to make transitions smoother for other children and families. All of your responses are confidential. If you wish an individual contact, you may sign your name at the end of the survey. Thank you for your time.

	YES	NO
1. I was an active member of my child's transition team.	____	____
2. I went to an orientation meeting to learn about my child's next program.	____	____
3. The orientation meeting helped me understand more about my child's new program.	____	____
4. Did you receive information about community programs your child might attend or privately run preschools?	____	____

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	YES	NO
5. I visited the programs or classrooms that were possible placements for my child.	____	____
6. I was told about my child's IFSP or IEP meeting far enough in advance for me to make plans to attend.	____	____
7. I took part in my child's IFSP or IEP meeting.	____	____
8. The timelines for my child's transition were reasonable.	____	____
9. Did preschool services start in a reasonable amount of time?	____	____
10. What amount of time passed from the time EI services ended and preschool services started?	_____	
11. School staff members were helpful and answered my questions about transition.	____	____
12. I felt comfortable during the transition meetings and program site visits.	____	____
13. I learned some things I could do to help my child make the move to the new program.	____	____
14. Overall, I felt good about my child's move to the new program.	____	____

15. I'm glad I had a chance to _____

_____

16. I wish I had been able to _____

_____

17. One thing I would be sure to tell other parents of children moving to a new program is

_____

_____

18. Additional comments:

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THE FACTS/LRE PROJECT

The FACTS/LRE project, initiated in January 1993, is an outreach/technical assistance grant funded by the federal Office of Special Education Programs, Early Childhood Branch. The Project Director is Dr. Susan Fowler.

BACKGROUND

The passage of Public Law 99-457 in 1986 created two early childhood programs for children with special needs, intended to provide a seamless service system for families and their young children between birth and age 5. Planning is sequired to avoid ruptures in this system when families and children change service providers.

Programs report confusion regarding their roles and responsibilities related to transition between services, screening, referral, evaluation, exchange of records, planning of transition, provision or continuation of services and conflicts regarding placement decisions, extended school year, procedural safeguards, preparation of personnel and other issues. At the same time, families describe a service system that too often is not responsive to their needs, not culturally and linguistically sensitive, and not delivered in the least restrictive environment.

PROJECT ACTIVITIES

Our two outreach channels are publications and technical assistance. In both our writing and our direct technical assistance, we encourage communities to build the following five components into the transition process:

1. Interagency agreements among service providers at the state and local levels
2. Transition planning for families to ensure they can make informed decisions
3. Timelines and guidelines which cover child assessments, transfer of records, program visits and other matters
4. Strategies to promote entry and adjustment of children—with specific emphasis on successful entry into nonspecialized, community-based settings to receive services in the least restrictive environment
5. Evaluation of the process

DESIGN: GRAPHIC SOLUTIONS, CHAMPAIGN, IL